FDF Creation

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FDF Creation

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Overview

FDF is the file format used for Acrobat forms. This format is used to submit form data to a server, receiving a response, and incorporating it back into a form that may be printed. Districts may create their own forms that pull information from the database onto the forms as well as save custom fields to the server. Forms can be uploaded in the Special Education, Health, and PLP modules in Campus.

Requirements

- Creating forms requires the full version of Adobe Acrobat (5.0 or higher)
- Filling in a form requires the FREE Adobe Reader (most current version).
- Saving forms requires the Campus Save Button.

Simple Forms

Simple forms (also referred to as FDFs) provide a way for districts to quickly produce and store single use documents associated with a student. They are useful for district customization or for forms that can be referenced in the future.

To make a simple form, the following is needed:

- A document that can be converted into a PDF document (Word, Excel, Powerpoint, etc.)
- Software to add form fields to a PDF document (Adobe Acrobat Professional, Nitro PDF Professional)
- A list of Reserved Name Field, listed at the end of this document
- Ability to upload Form documents in Special Education, PLP, Health, Counseling modules

When the form field is added to the document and named using one of the reserved field names, the data will be populated from existing information in Campus when the document is opened.

Documents using reserved field names are called Active documents. There are also Blank documents, which should not use form fields.

Conversion of Original Document to PDF

It is recommended that the majority of editing be done prior to conversion to PDF. Remove extra lines, spaces and tabs, boxes, etc. Edits can be made in the PDF view, but it is more difficult to do.

There are two (2) ways to convert documents to a PDF file using Adobe. Consult the Adobe documentation for additional details.

Option 1:

1. From the main document, select the **File menu** and select the **Print** option.
2. Select the **Acrobat Distiller** printer from the printer dropdown list.
3. Click the **OK** button.

Option 2:

1. From the Word document, select the Adobe icon in the toolbar or select the Adobe PDF format option in the header row.
2. If the document has been modified since last saved, it will need to be saved again. Once saved, a second Save As box will appear asking for the location to which to save the PDF document. Enter the appropriate file name and select the appropriate folder.
3. Select the Convert to Adobe PDF option and select the file location for the new file.
4. Click the Save icon. The document will process; the length of time this takes will vary depending on the size of the document. Once finished, the PDF document will appear in the folder where it was saved.

Creating FDF Fields in Adobe Acrobat Professional©

1. Review the PDF document to be sure the format is correct.
2. Review the reserved name list (listed below).
3. Click on a Form Tool in Adobe Acrobat to add the Form fields. If creating a text field, use the text field tool. Refer to the Adobe documentation for proper use.
4. Use the cursor to create the field in the chosen area.
5. In the Field Properties box, the field name must be entered exactly as it appears in the list of Reserved Name Fields if you want the data to be auto populated from the database.
6. Click on the Options tab and check for other pertinent settings.
7. Click OK when finished.

Tips:

- Check boxes, e.g. Yes/No, will have the same name but different values if you want them to be single select check boxes.
- Radio buttons may be used in cases where a choice does not need to be undone.
- For fields that will have multiple lines of text written in them, check the Multi-line choice and uncheck the scrolling long text field.

An interactive PDF form created by Acrobat Professional can contain the following form elements:

- Buttons
- Check boxes
- Combo box
- List box
- Radio buttons
- Text field
- Digital signature field
- Customize look and feel of elements via property windows

Double click the element or right click/properties to customize elements.

Adding the Campus Save Button

Infinite Campus has a template for FDFs with a Save button that is coded to submit your completed form back to the database.

1. Open the Campus FDF Template with the Save button.
2. Select the **Tools Menu** at the top of the page.
3. Select the **Advanced Editing** option on the Tools Menu.
4. Choose **Select Object Tool**. The form fields on the template will display.
5. Right-click on the **Save** button and click the **Edit Copy** option.
6. Paste the Save button into the new FDF.

Adding the document to the User Interface

Use the Form Document Upload tool to make the document available to users. Users must have rights to the Form Document tool in System Administration to upload a document. Documents can be uploaded to PLP, Health, Counseling and Special Education areas.

1. Open System Administration and navigate to the tool area (PLP, Health, Counseling, or Special Ed) where the FDF document should be added.
2. Select the New Form Document from the Form Documents area.
3. If adding a document that has form fields, select the Active FDF checkbox; otherwise check the Active Blank FDF checkbox.
4. Give the document a short but concise name.
5. Browse to the FDF document that was saved earlier.
6. Click on the Save icon.

If there are blank versions of the document (No form fields) and would like to add it to the User Interface, follow the same instructions but choose the Active Blank FDF checkbox. When a new version of a form becomes available:

1. Create the new form following all the steps above.
2. Find the previous uploaded version of the form in the Form Document list and remove the checkbox from the Active FDF field.
3. Add the new document using the Form Document Upload tool.

Reserved Name List

Student Information Fields	Notes
stateID	
studentID	
studentName	Displays Last Name, First Name Middle Name
studentFirstLastName	Displays First Name, Middle Name Last Name
studentFirstName	
studentLastName	
studentMiddleName	
studentDOB	
grade	
studentGender	
studentAge	
studentHomePhone	
studentAddress1	
studentAddress2	
Guardian Fields	**Notes**
guardian1Name	Displays Last Name, First Name, Middle Name
guardian1FirstLastName	Displays First Name Middle Name Last Name
guardian1LastName	
guardian1FirstName	
guardian1MiddleName	
guardian1WorkPhone	
guardian1Relationship	
guardian1HomePhone	
guardian1Address1	
guardian1Address2	

guardian2Name	Displays Last Name, First Name, Middle Name
guardian2FirstLastName	Displays First Name Middle Name Last Name
guardian2LastName	
guardian2FirstName	
guardian2MiddleName	
guardian2WorkPhone	
guardian2Relationship	
guardian2HomePhone	
guardian2Address1	
guardian2Address2	
School/District Information Fields	**Notes**
districtInfo	
districtName	
districtAddress1	
districtAddress2	
districtPhone	
schoolName	
schoolAddress1	
schoolAddress2	
schoolPhone	
currentDate	
date	
user	Displays the user's full name
username	
tmName1-tmName12	tm = Team Member
tmTitle1-tmTitle12	tm = Team Member
caseManager	
caseManagerTitle	
caseManagerPhone	